

# Appendix B - USGS Professional Pages User Guide

(Updated Sept 1, 2010)

**Note:** It is highly recommended that the Internet Explorer version 7 or higher browser be used build profiles. When using Safari and Firefox browsers, unintended extraneous text/font (via the text insertion tool described below.) will be visible in the profile.

## Login to the Profile Builder

Step 1: Prerequisite - Users must have a Lotus Notes e-mail account before accessing USGS Professional Pages.

Step 2: Enter your Lotus Notes email address into the Username box and your Lotus Internet password into the Password box. **[Figure 1]**

The screenshot shows the USGS Professional Pages Profile Builder login screen. At the top, there is a USGS logo with the tagline "science for a changing world" and a navigation bar with buttons for Home, Search Professionals, Profile Builder, and Featured Profiles. Below the navigation bar, there are links for Policy Guidelines, Frequently Asked Questions, About The Internal Release, and Help. The main heading is "Welcome to the USGS Professional Pages Profile Builder". The text below explains that users need to login with their Lotus Notes Internet User ID and Password. It lists three benefits of logging in: creating a Professional Summary, highlighting and promoting selected Publications, and finding, connecting, and collaborating with other USGS Professionals. There are two main sections: "Existing User Login" and "New User Registration". The "Existing User Login" section has a form with a Username field (containing "@usgs.gov" and an example "jdoe@usgs.gov") and a Password field, with a Login button. The "New User Registration" section provides instructions on using USGS email and Lotus Notes Internet password, and mentions contacting the USGS IT Service Desk for help. At the bottom, there are links for "Forgot Username or Password?" and "Need Support for USGS Professional Pages?".

**USGS**  
science for a changing world

USGS Home  
Contact USGS  
Search USGS

**USGS Professional Pages**

Home Search Professionals Profile Builder Featured Profiles

[Policy Guidelines](#) | [Frequently Asked Questions](#) | [About The Internal Release](#) | [Help](#)

**Welcome to the USGS Professional Pages Profile Builder**

To get started building your own Professional Page or to modify your existing Professional Page, please login using your Lotus Notes Internet User ID and Password.

Once you are logged in, you will be able to create or modify your Professional Page, which allows you to:

- Create a Professional Summary, which includes your biography, research focus, professional interests, etc.
- Highlight and promote selected Publications
- Find, connect, and collaborate with other USGS Professionals who share your interests.

**Existing User Login**

If you have a USGS Lotus Notes Internet password, you may enter your "@usgs.gov" email address and Lotus Notes Internet password in the form below to login into USGS Professional Page - Profile Builder.

Username:   
e.g., jdoe@usgs.gov

Password:

**New User Registration**

USGS users can use USGS email (username@usgs.gov) and Lotus Notes Internet password without any new registration.

For setting up a new user registration or to recover your password - please contact the USGS IT Service Desk at 703-648-HELP (4357).

**Forgot Username or Password?** Call USGS IT Service Desk at 703-648-HELP(4357).  
**Need Support for USGS Professional Pages?** Call USGS Professional Pages Support 703-648-7142 or contact through [Feedback](#) option.

**Figure 1: Login Screen**

Step 3: Select the *Login* button and the screen shown in Figure 1 will appear. Professionals can build a profile by completing six tabbed form areas (General, Vita, Research Focus, Publications, USGS Topics, and Optional Content) before publishing their Professional Page.

**Important:** Be sure to save your edits frequently by clicking on the *Save* buttons associated with each area.

## Build a Profile

### General Tab - Enter General Information [Figures 2, 3, and 4].

Step 1: Contact information is automatically populated using Lotus Notes employee profile data (Figure 2). Review your contact information and if everything is correct, click the *Submit Your Notes Address Book Information* button, otherwise your profile will not be saved.

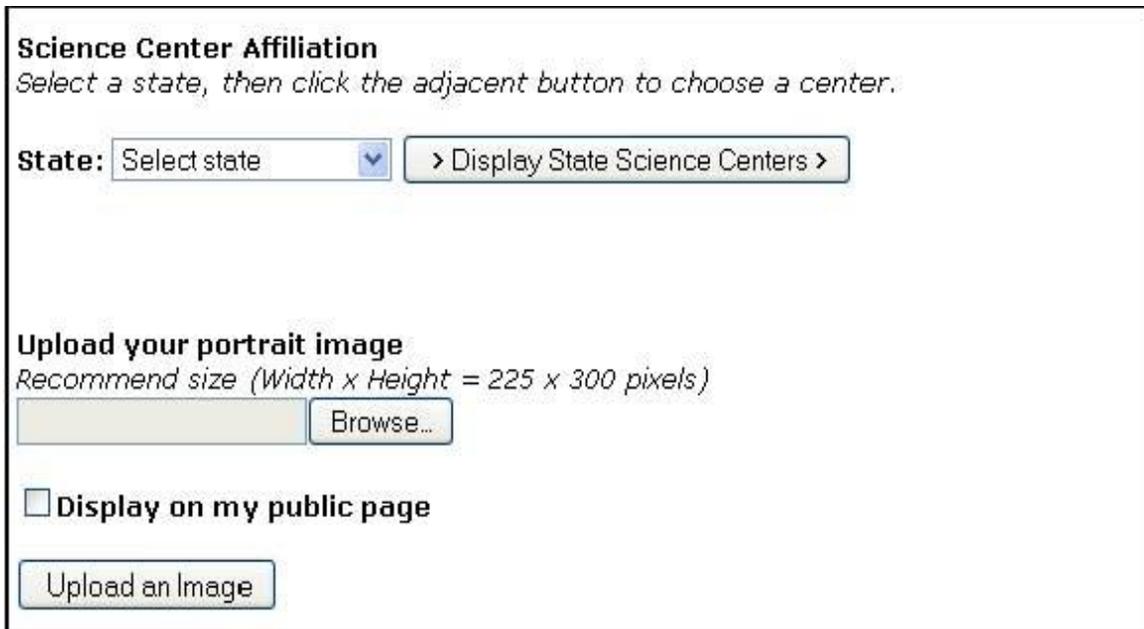
If the Lotus Notes information is incorrect select the “Request Notes Information Change” button. You can also call the USGS IT Service Desk (703-648-4357) to have your Lotus Notes information updated.

The screenshot shows the 'USGS Professional Pages' interface. At the top, there is a navigation bar with the USGS logo and the tagline 'science for a changing world'. Below the logo is a row of six small images. To the right of these images are links for 'Intranet Home', 'Find A Person', and 'Search Intranet'. The main header area contains the text 'USGS Professional Pages' and 'For Internal USGS Access Only'. Below this is a horizontal menu with buttons for 'Home', 'Search Professionals', 'Profile Builder', 'Featured Profiles', 'Manage Others', and 'Admin'. A secondary menu contains links for 'Policy Guidelines', 'User Guide', 'Frequently Asked Questions', 'About The USGS Professional Pages', and 'Help'. On the right side of the page, there is a '[Logout]' link. The main content area starts with a 'Welcome' message for 'U.S. Geological Survey, Central Region, Rocky Mountain area, Biology discipline'. It then provides instructions on how to create or modify a profile. A list of instructions follows, detailing the requirements for 'General Information', 'Vita', 'Research Focus', 'Publications', 'USGS Topics', and 'Optional Content'. An 'IMPORTANT' notice states: 'Be sure to save your edits frequently by clicking on the Save buttons associated with each content area.' Below this is a tabbed interface with tabs for 'General', 'Vita', 'Research Focus', 'Publications', 'USGS Topics', 'Optional Content', and 'Manage Profile'. The 'General' tab is active, showing 'Contact information' for 'John Doe' at 'USGS', 'IT Computer Ops', 'Science Center', '5555'. Other fields include 'Address', 'City', 'State', 'Zip', 'Country: USA', 'Phone: 999-555-1234', 'Fax: 999-555-5678', 'Mobile', and 'Email: jdoe@usgs.gov'. There are two checkboxes: 'Display on my public page.' (checked) for both 'Mobile' and 'Email'. At the bottom of the form, a button labeled 'Request Notes Information Change' is circled in red.

Figure 2: Contact Information

Step 2: Select the *State* where your Science Center is located (Figure 3).

Step 3: If you want a portrait displayed on your homepage, check the *Display on my Public Page* box and then click the *Browse* button to find image files stored on your Computer. Highlight the portrait image file you want to display and then click *Upload an Image* (Figure 3).

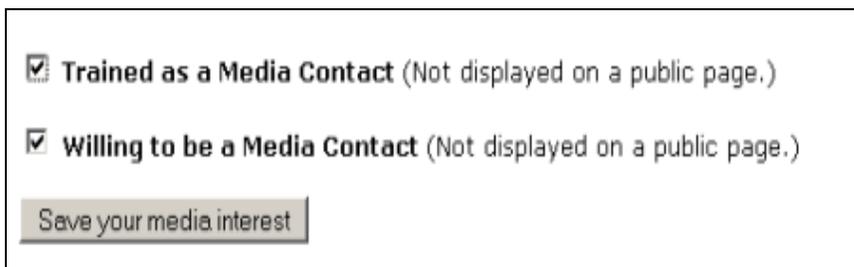


The screenshot shows a form titled "Science Center Affiliation" with the instruction "Select a state, then click the adjacent button to choose a center." Below this, there is a "State:" label followed by a dropdown menu showing "Select state" and a button labeled "> Display State Science Centers >".

Below the state selection is a section titled "Upload your portrait image" with the instruction "Recommend size (Width x Height = 225 x 300 pixels)". This section includes a text input field, a "Browse..." button, a checkbox labeled "Display on my public page", and an "Upload an Image" button.

**Figure 3: Science Center Affiliation and Portrait Image Upload**

Step 4: If you are a trained media contact, select the *Trained as Media Contact* box (Figure 4). If you are not a trained media contact but are volunteering to become one, select the *Willing to be a Media Contact* box. Selection as a media contact, either trained or willing, will require supervisory approval and coordination with the Office of Communications. Refer to [Appendix A](#) (Policies and Guidelines) for additional information.



The screenshot shows a form with two radio button options, both of which are selected. The first option is "Trained as a Media Contact (Not displayed on a public page.)" and the second is "Willing to be a Media Contact (Not displayed on a public page.)". Below these options is a "Save your media interest" button.

**Figure 4: Media Contact**

## Delete

If at any point you need to delete the information you've already entered use the 'Delete' button found at the bottom of the screen for each tab. When the 'Delete' button is selected, only the information on the current page will be deleted from the profile.

## **Inserting Text and Links**

If you are using the Internet Explorer browser (highly recommended) when building your profile, you can copy and paste your textual content directly into the text area. If you are using Safari and Firefox browsers follow the instructions for using the text tool below. The linking tool provides an easy way to add hyperlinks.

### **Using the Text Tool [Figures 7 and 9]**

If you are using Safari and Firefox browsers, a text tool is available to alleviate text/font formatting elements that may be encountered during building of your profile. If the text tool is not used with these browsers, the result will be unintended extraneous text/font elements that will be visible in your profile. The text tool can be used with the Internet Explorer browser, but is not necessary. Figures 7 and 9 show an example of inserting text into a profile area using the text tool. Step-by-step instructions for using the text tool are also provided below.

In Safari or Firefox browsers, complete the following steps using the text tool to insert text into your profile:

- Step 1: Highlight the text you want from your original document then copy the text via edit functions of the application.
- Step 2: Click on the word icon as shown in Figures 7 and 9.
- Step 3: When the text pop up window appears please hold down the CTRL and V buttons to insert the text into the text tool.
- Step 4: Click on the insert key.

The text will now be in the text field area. Once these steps are complete you will still need to review the text for proper spacing and insertion of desired styles such as bold or underline.

### **Using the Linking Tool [Figures 8 and 10]**

To complete the following steps using the linking tool to insert hyperlinks to documents and publications into your profile:

- Step 1: Highlight the words within the text area to be linked.
- Step 2: The linking icon should be now available. Click on the linking icon as shown in figures 8 and 10.
- Step 3: When the linking pop-up window appears type in the Link URL address
- Step 4: Click on the Title name and enter in a tagged name for the link address.
- Step 5: Click on Update when completed.

## Removing a Link

Step 1: Highlight the words within the text area.

Step 2: The linking icon should be now available. Click on the linking icon as seen in figures 8 and 10

Step 3: When the linking pop up window appears please delete the Link URL address

Step 4: Click on the Title name and delete the tagged name for the link.

Step 5: Click on Update when completed.

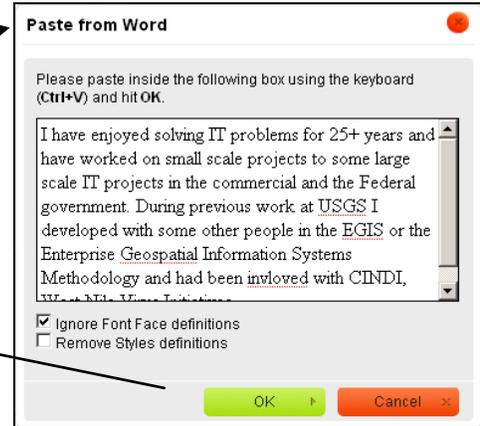
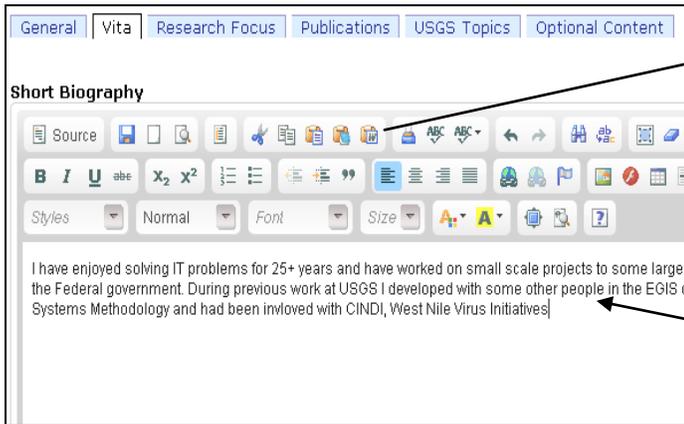


Figure 7: Text Insertion

Figure 9: Using the Text Tool to Paste Text for Insertion

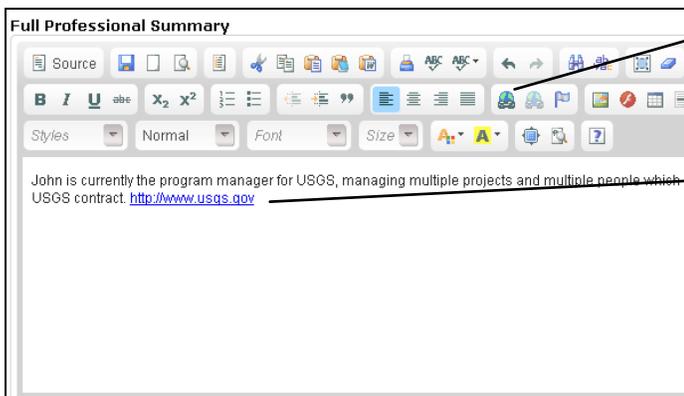


Figure 8: Link Insertion

Figure 10: Using the Linking Tool To Insert a Hyperlink

## Important Tips to Follow When Building Profiles

- Personally identifiable information (such as home address and phone number, and personal e-mail address) is not allowed.
- Use proper and professional photographs or images.
- Contractors are not allowed to enter their profiles into the Professional Pages database.

- The focus should be on USGS “contributions” or information within short biography. Personal information and interests are not allowed in profiles.
- Before using an acronym, spell out the complete name the first time it is used and place the acronym in parentheses after it. For example World Data Center for Biodiversity and Ecology (WDC-BE).
- Each hyperlink must be a working link ( for example, <http://www.usgs.gov>).
- Proper USGS-style punctuation *and* grammar should be used.
- The short biography and full professional summary should contain past and present contributions, not activities or events that have not yet happened.

### VITA Tab - Enter VITA (Resume) Information [Figure 11].

Step 1: Enter a short biography and full professional summary. You can copy and paste information into these boxes using text from another document (see section on inserting text).

The image shows a web form with two main sections for text entry:

- Short Biography:** This section includes a rich text editor toolbar with options for bold, italic, underline, text color, background color, font size, and alignment. Below the toolbar is a large text area. A note below the text area states: "Your short biography should be no more than 600 characters."
- Full Professional Summary:** This section also includes a rich text editor toolbar with similar options. Below the toolbar is a large text area. A note below the text area states: "Your summary should be approximately 1 page (2500 characters); your publications will appear elsewhere."

**Figure 11: Short Biography and Full Professional Summary**

Step 2: Select the Save Vita button after the sections have been entered, edited, and proofread for accuracy.

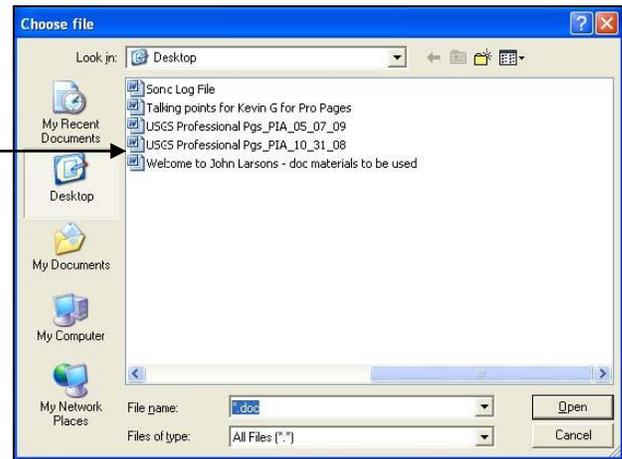
## Vita (Resume) Download and Display [Figures 12-15]

- Step 1: To download a Vita (Resume) file stored on your Computer, click the *Browse* button. Highlight the selected file and then click *Upload File* (as shown in Figures 12, 13, and 14).
- Step 2: Check the *Display for download of Public Page* box (as shown in Figure 12).
- Step 3: Click the Save Vita button to save your Vita (as shown in Figure 15). To delete the uploaded file click the delete hyperlink area.

**Upload Your Curriculum Vitae as an Attachment**

**Display for Download on Public Page**

**Figure 12: Browse for Curriculum Vita**



**Figure 13: Select Curriculum Vita File on Your Computer**

**Upload Your Curriculum Vitae as an Attachment**

C:\Documents and Settli

**Display for Download on Public Page**

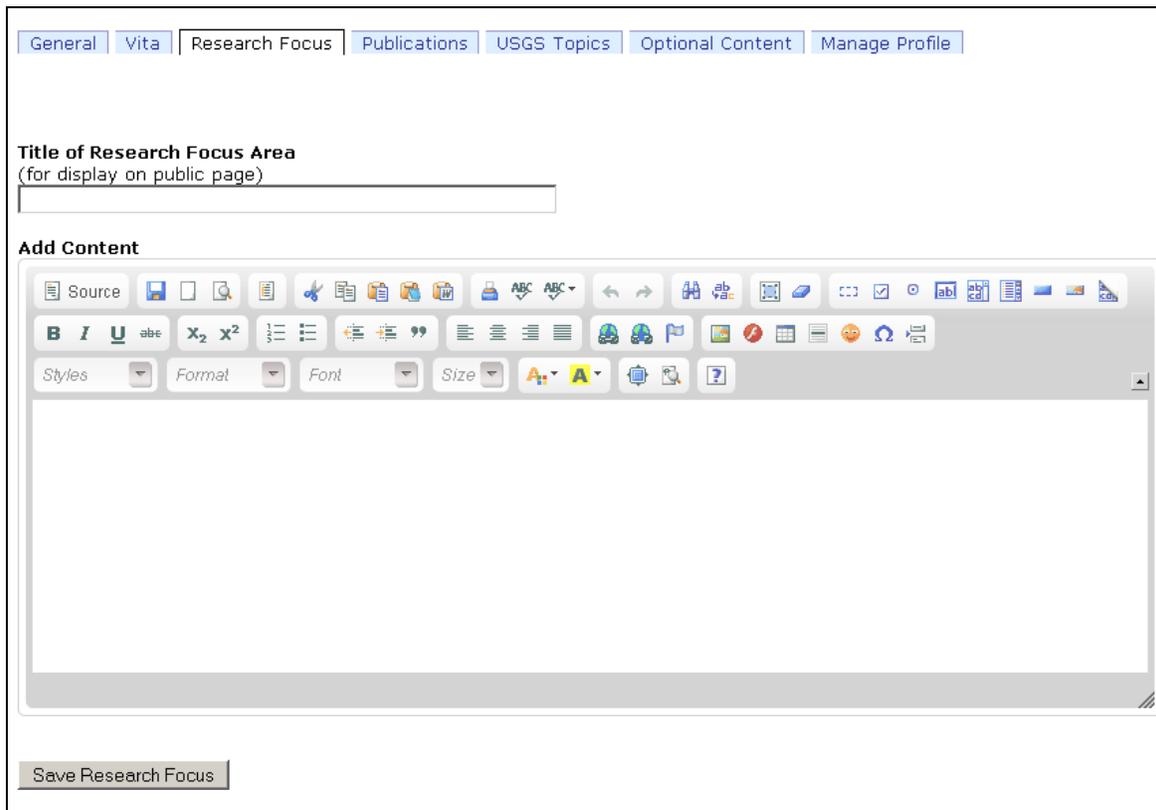
**Figure 14: Curriculum Vita (Resume) Upload**

[Attachment](#)    Uploaded Aug 11, 2010 03:16 PM    [Delete](#)

**Figure 15: Save Curriculum Vita (Resume)**

## Research Tab - Enter Research Focus [Figure 16].

- Step 1: Enter the title of your research focus area (e.g. Volcano Hazards, Mineral Resources, etc.) and the content that briefly describes the research area. This will appear at the top right of your homepage.
- Step 2: To display an image related to the research area, check the *Display on Public Page* box and then click the *Browse* button to view image files stored on your Computer. Highlight the correct file and then click *Upload Image*.



The screenshot shows a web interface for editing a profile. At the top, there are several tabs: "General", "Vita", "Research Focus", "Publications", "USGS Topics", "Optional Content", and "Manage Profile". The "Research Focus" tab is currently selected. Below the tabs, there is a section titled "Title of Research Focus Area" with a subtitle "(for display on public page)" and a text input field. Underneath this is a section titled "Add Content" which contains a rich text editor. The editor has a toolbar with various icons for text formatting (bold, italic, underline, text color, background color), lists, links, and images. Below the toolbar is a large, empty text area for entering content. At the bottom of the form, there is a "Save Research Focus" button.

**Figure 16: Research Focus**

## Publications Tab - Add Publication(s) from the USGS Publications Warehouse [Figures 17 and 18].

For consistency, USGS publications should be entered using the provided field within the profile builder, where the resulting hyperlink automatically links to the USGS Publications Warehouse database. All listed publications should be related to your USGS career or your related field of study.

- Step 1: Select the *Add Publication from the Publications Warehouse* button (as shown in Figure 17).
- Step 2: Add the title, author, and abstract description.

General | **Vita** | Research Focus | Publications | USGS Topics | Optional Content

Search U.S.G.S. Publications Warehouse for keywords occurring in Title, Author or Abstract.

Enter Title, Citation and Summary for publications not listed in Publications Warehouse.

Copy a list of publications from an existing document.

**Figure 17: Publications Search Form**

Step 3: Click Search and a list of publications will be displayed (as shown in Figure 18). Select one or more publications and then click *Add Publications*. A summary of the publications selected will appear on the screen. Close the window and repeat the steps or return to the homepage to confirm your selection.

Search results from Pubwarehouse		
Select	Title	Author
<input checked="" type="checkbox"/>	An improved method for the determination of FeO in rocks and minerals including garnet	Reichen, Laura E.; Fahey, Joseph John
<input type="checkbox"/>	Resource assessment of the U.S. Bureau of Land Management's Winnemucca District and Surprise Resource Area, northwest Nevada and northeast California; resources of industrial rocks and minerals	Nash, J. T.
<input type="checkbox"/>	Analyses of rocks and minerals from the laboratory of the United States Geological Survey, 1880 to 1914	Clarke, Frank Wigglesworth
<input type="checkbox"/>	Reproducibility of the K-Ar ages of rocks and minerals; an empirical approach	Tabor, Rowland W.; Mark, R. K.; Wilson, R. H.

**Figure 18: Select Publications**

**Publication Tab - Add a Publication Using Form [Figure 19].**

Step 1: Select the *Add a Publication Using Form* button.

Step 2: Enter a name for the publication be added. Avoid duplicating publications that have already been listed under the Publications Warehouse button.

Step 3: Write or copy and paste a citation from another document.

Step 4: Write or copy and paste a non-technical summary.

Step 5: To upload a publication or article instead of copying it into the form, check the *Display for download on Public Page* box and then click the *Browse* button to select publication files stored on your Computer. Highlight the desired file and then click *Save Publication*.



## USGS Topics Tab – Select Research Areas [Figure 21]

Step 1: Select research areas (e.g. Planets) using the drop down menu.

Step 2: Click the *Select Sub Topics* radio button for subtopics to appear.

Step 3: Check the box next to each subtopic and then click the *Select Subtopic* button underneath the list of subtopics.

Step 4: To select all your research areas and subtopics, repeat steps 1 and 2.

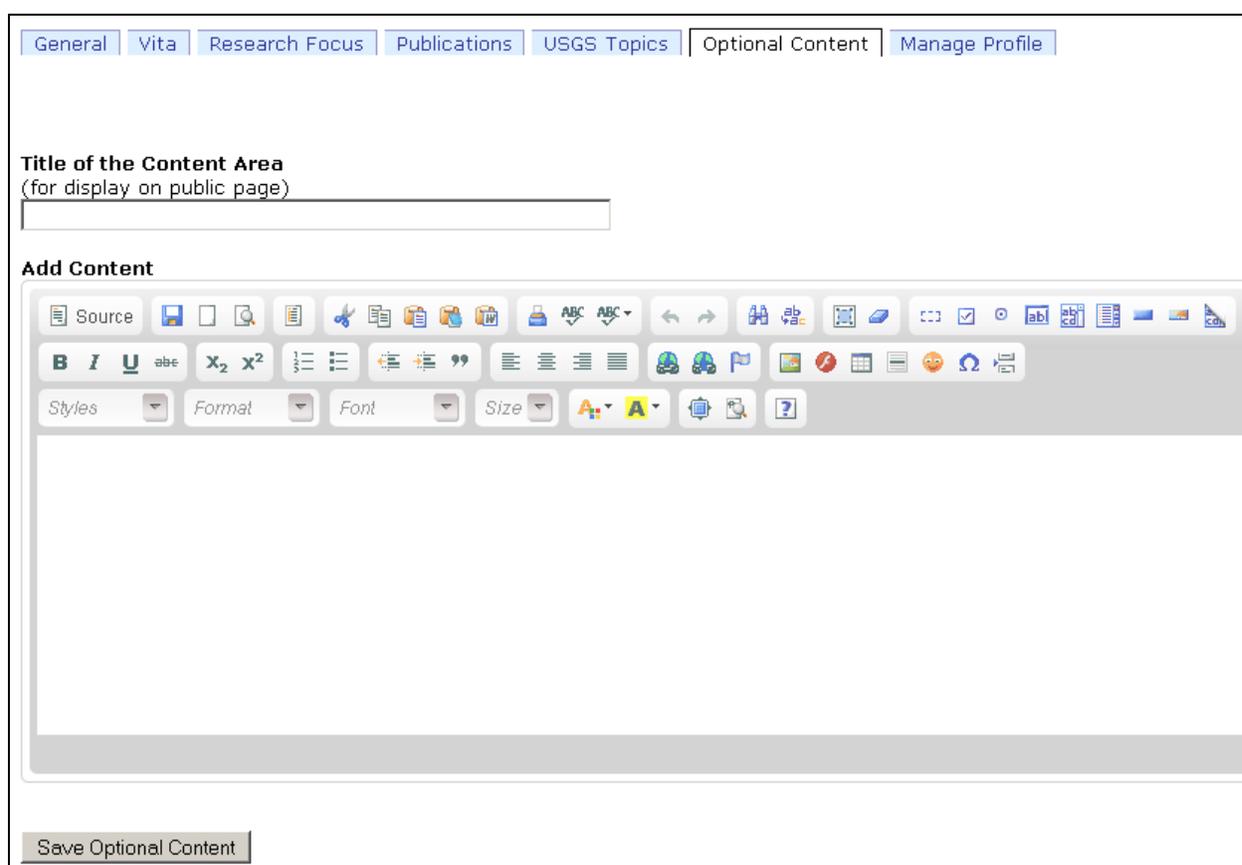
Step 5: Check a box for each of your strategy areas and then click *Select your Strategy Areas* button.

The screenshot shows a web interface with a navigation bar at the top containing tabs: General, Vita, Research Focus, Publications, USGS Topics (selected), and Optional Content. Below the navigation bar is the heading "Select Your Research Areas" and the sub-heading "By Science Topics". A dropdown menu labeled "Select Science Topic" is open, showing a list of science topics: Atmosphere and Climate, Earth Characteristics, Ecology and Environment, Environmental Issues, Geographic Analysis and Mapping, Geologic Processes, Hydrologic Processes, Natural Hazards, Natural Resources, Oceans and Coastlines, Planets, Plants and Animals, Techniques and Methods, and Water Resources. To the right of the dropdown is a button labeled "> SELECT SUB TOPICS>". Below this button, there is a list of subtopics with checkboxes: "Predicting Ecosystems Change", "The Role of Environment and Wildlife in Human Health", "A Water Census of the United States", "Future", "Data Integration & Interoperability", and "Resilience Assessment Program". At the bottom of the interface is a button labeled "Select Your Strategy Areas".

Figure 21: USGS Science Topics, Subtopics, and Strategy Areas

## Other Content Tab - Add Optional Content [Figure 22]

- Step 1: Add the title of the content area, such as professional association memberships, professional and science awards and interests, etc.
- Step 2: Add content description or cut and paste the description from another document.
- Step 3: Click the *Save Optional Content* button.
- Step 4: If you want an image displayed on your homepage, check the *Display on my Public Page* box and then click the *Browse* button to select an image file stored on your Computer. Highlight the portrait image file and then click *Upload an Image*.



The screenshot shows a web interface for editing a profile. At the top, there are several tabs: 'General', 'Vita', 'Research Focus', 'Publications', 'USGS Topics', 'Optional Content', and 'Manage Profile'. The 'Optional Content' tab is currently selected. Below the tabs, there is a section titled 'Title of the Content Area' with a subtitle '(for display on public page)'. This section contains a single-line text input field. Below this is a section titled 'Add Content' which features a rich text editor toolbar. The toolbar includes icons for source code, undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, video, table, and other formatting options. Below the toolbar is a large, empty text area for entering content. At the bottom of the form, there is a 'Save Optional Content' button.

**Figure 22: Other Content**

## Manage Profile Tab – Preview, Publish, Unpublish and Delegate Profile

The Manage Profile tab contains functionality that allows the user to preview, publish, unpublish and add delegates to his or her profile.

[Type a quote from the document or the summary of an interesting point. You can position the text box anywhere in the document. Use the Text Box Tools tab to change the formatting of the pull quote text box.]

General Vita Research Focus Publications USGS Topics Optional Content Manage Profile

### Manage / Publish Profile

Users allowed to manage profile  
(Currently no users are delegated to manage this profile.)

To delegate a new user to manage this profile start typing their name in the text box above beginning with their first name. As typing pauses a list of users will appear as possible candidates to select from. Continue to refine the search by typing more characters of the user's name or select the user from the auto populated list to finish populating the text box. Click the "Add Delegate" button to add the selected user as a delegate.

### Publish Profile

**Supervisor listed for this profile is:**

John Doe  
(jdoe@usgs.gov)

**IMPORTANT:**

When publishing a profile a notification is generated. Typically its acceptable to have this notification sent to the supervisor listed for the profile however there are some instances where this isn't desired. In these instances selecting "gs\_help\_profile@usgs.gov" will have the notification sent to the Professional Pages Support Group / Helpdesk instead of the listed supervisor. Please verify the e-mail address listed above is correct and whether the supervisor should receive the notification or not.

If the listed supervisor is missing, incorrect or the notification shouldn't go to the supervisor select "gs\_help\_profile@usgs.gov" instead.

**Notification Recipient:**

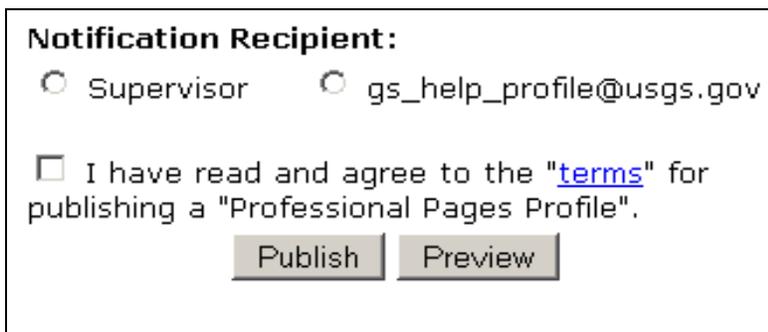
Supervisor     gs\_help\_profile@usgs.gov

I have read and agree to the "[terms](#)" for publishing a "Professional Pages Profile".

Figure 23: Manage Profile Tab

Descriptions of these buttons and their intended use in building your profile are as follows:

- **PREVIEW:** Allows the user to preview their profile at any time to see their building progress and view how their Professional Page will be displayed on the Web.
- **PUBLISH:** Allows the user to publish their Professional Page profile to the Web. Prior to selecting this button, a notification recipient must be selected and the “terms” box must be checked.
- **NOTIFICATION RECIPIENT:** Notifies the recipient by email that the user has published their profile. A notification recipient must be selected before a user can publish their profile.
- **TERMS:** This box must be checked after reading the Professional Pages Agreement form before a user can publish their profile. To read this agreement, select the “terms” link and the form will appear on screen as shown in Figure 28.



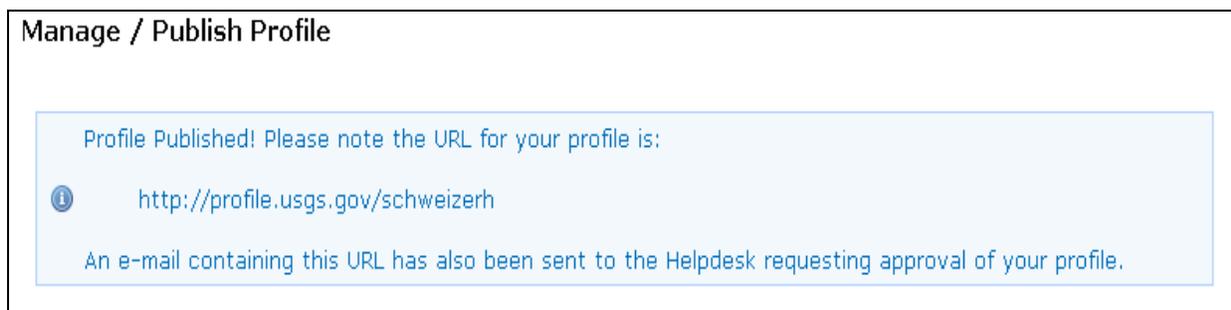
**Notification Recipient:**

Supervisor     gs\_help\_profile@usgs.gov

I have read and agree to the "[terms](#)" for publishing a "Professional Pages Profile".

**Figure 24: Preview and Publish Functions**

Once the profile has been published, a blue box will appear at the top of the screen containing confirmation that the profile has been published as well as the URL the profile is located. See figure 25.



Manage / Publish Profile

Profile Published! Please note the URL for your profile is:

<http://profile.usgs.gov/schweizerh>

An e-mail containing this URL has also been sent to the Helpdesk requesting approval of your profile.

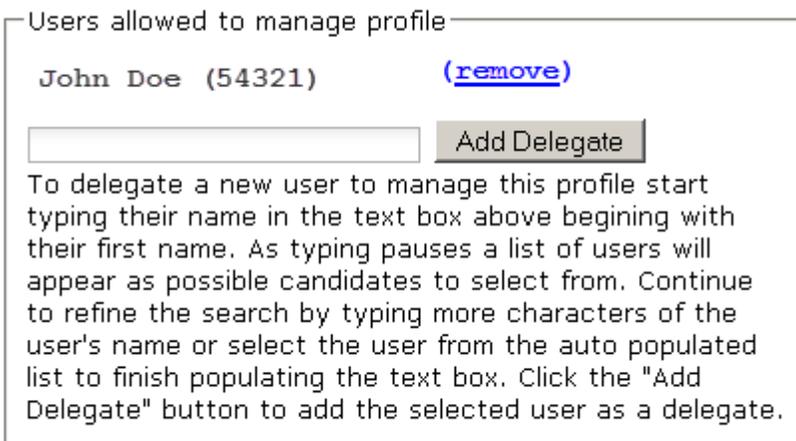
**Figure 25: Published Profile’s Confirmation and URL**

- **UNPUBLISH:** Allows the user to unpublish or **remove** their profile from the Professional Pages Web site. For example, after publishing your profile you may wish to make corrections or update your information. Click the *Un-publish* button and after making your changes, you may click the *Preview* button to review your corrections or click the *Publish* button to place your profile back on the Professional Pages Website. Make sure to click the save buttons where appropriate to save your information.



**Figure 26: Unpublish Button**

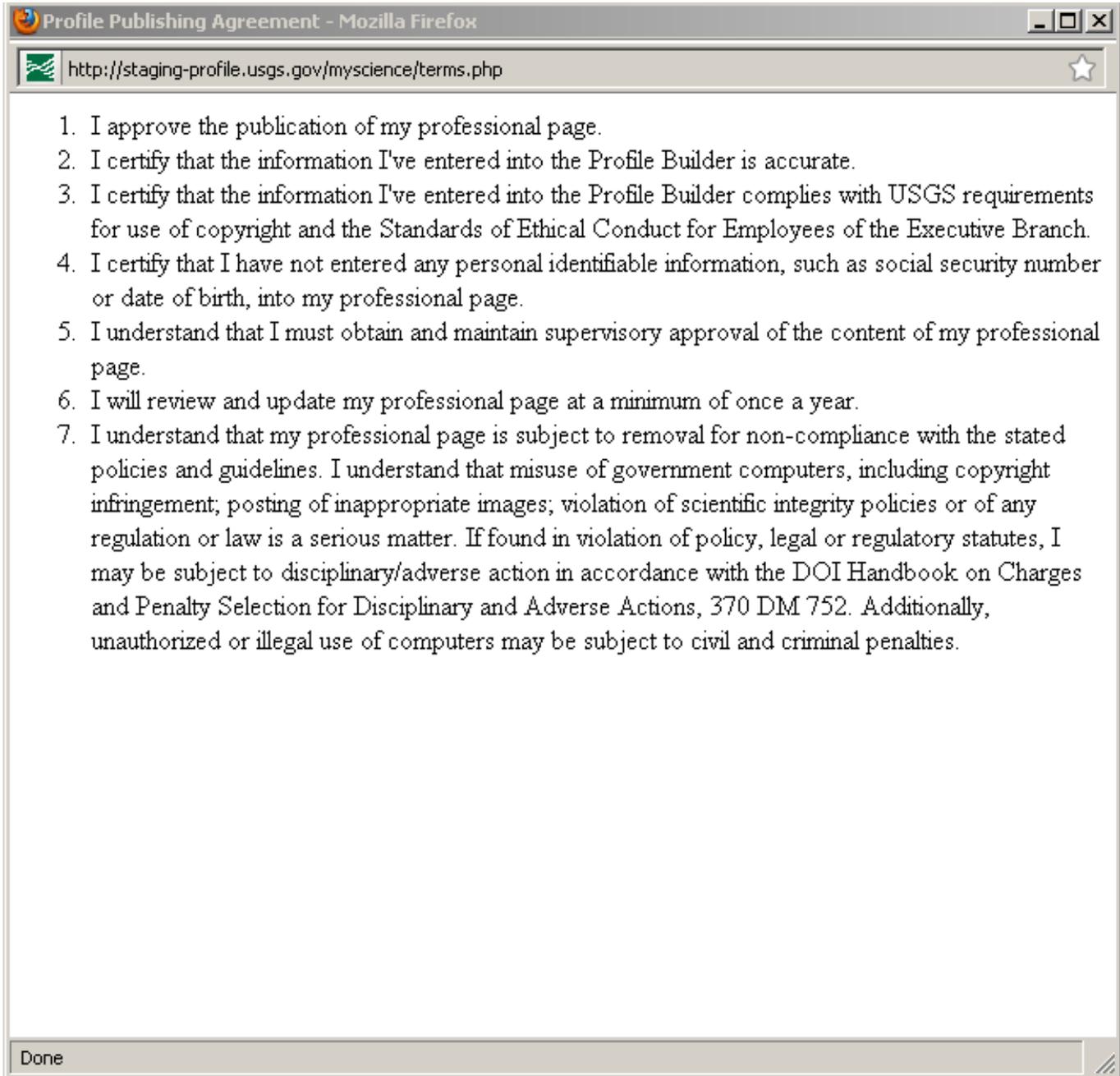
- **ADD DELEGATE:** Allows a user to select a different staff member to build their (the user) profile. For example, you need your assistant to build your profile. Start typing your assistant's first name into the text box. A list will automatically be generated by matching the letters you've typed in to matching names in the database. Once you select your assistant's name, click on the *Add Delegate* button. The assistant's name will appear at the top of the box with a link located to the right to remove the name.



**Figure 27: Add Delegate**

## Employee Professional Pages Agreement to Publish [Figure 28]

After a user clicks the *Publish* button, a *Professional Page Agreement* screen appears (as shown in Figure 28).



**Figure 28: Professional Page Agreement**

Employees must certify that they have met all requirements contained in the Agreement prior to publishing their Professional Page by checking the box next to *"I have read and agree to the "terms" for publishing a "Professional Pages Profile"*.

## Automatic Supervisor Notification [Figure 29]

Supervisors will receive an automatic e-mail notification that is generated when the employee when the employee publishes their profile. Supervisors are required to follow the steps contained in the automatic e-mail notification to certify approval of the employee's profile.

<b>/GIO/CONT/USGS/DOI</b>	<b>To</b>	Supervisor@usgs.gov
01/29/2009 02:56 PM	<b>cc</b>	
	<b>bcc</b>	
	<b>Subject</b>	Professional Pages Approval Request from an Employee

Dear Supervisor:

The following employee, under your supervision, has submitted his/her professional profile for publishing on the USGS Professional Pages website:

You must review the information on the USGS Professional Page for this employee considering the requirements set forth in Policies and Guidelines for USGS Professional Pages (<https://profile.usgs.gov/Policy.html>) as well the requirements in USGS Fundamental Science Practices: Review, Approval, and Release of Information Products (<http://www.usgs.gov/usgs-manual/500/502-4.html>).

The checklist below can be used as a guide for supervisory review and approval of a USGS Professional Page:

- All content is of professional nature and relates directly to the professional career of the employee.
- All links conform to the Linking Policy stated in the USGS Policy and Guidance for Professional Pages.
- There are no copyrighted materials that have been uploaded and linked to from this employee's professional page.

If you approve the publication of this page, no further action is needed.

To deny publication of this profile as shown, please call the the help desk for removal of the access to the webpage. When you and your employee are in agreement, your employee can go onto the website and re-publish his or her profile.

If you have any questions, please contact the USGS Help Desk by calling 703-648-7300.

**Figure 29: Automatic Supervisor Notification**

## For Assistance

If there are any questions or if further assistance is needed, please contact the USGS IT Service Desk by phone (703-648-4357), e-mail ([servicedesk@usgs.gov](mailto:servicedesk@usgs.gov)), or on-line (<https://support.usgs.gov/>).